

Message Text

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SUBJECT: IEA STANDING GROUP ON LONG TERM COOPERATION -
SUB GROUP ON ENRICHED URANIUM SUPPLY - REPORT OF THE
SUB-GROUP ON ENRICHED URANIUM SUPPLY: FORECASTS OF
NUCLEAR POWER GROWTH TO 1985

REF: OECD PARIS 8426

1. FIRST REVISION OF SUBJECT REPORT (IEA/SLT(76)21)
RESULTING FROM MARCH 30 MEETING IS AS FOLLOWS:
"INTRODUCTION: ON 8TH SEPTEMBER 1975 THE STANDING
GROUP ON LONG TERM COOPERATION (SLT) ASKED THE SUB
GROUP ON ENRICHED URANIUM SUPPLY (SEUS) TO OBTAIN FORE-
CASTS OF NUCLEAR POWER GROWTH FROM EACH OF THE
PARTICIPATING COUNTRIES, TO DEVELOP CRITERIA FOR
ASSESSING THE LIKLIHOOD OF ACHIEVING NUCLEAR POWER
PROGRAMS AND TO REPORT TO SLT ON ITS ASSESSMENT OF THE
NUCLEAR CAPACITY LIKELY TO BE REALISED BY 1985 AND
1990. THIS REQUEST WAS MADE IN RECOGNITION OF THE
IMPORTANT ROLE NUCLEAR POWER WILL HAVE IN MEETING
FUTURE ELECTRICITY SUPPLY NEEDS AND AGAINST THE BACK-
GROUND OF PROGRESSIVE DOWNWARD REVISIONS OF FORECASTS,
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IN MARCH AND AUGUST 1975, BY MEMBER COUNTRIES OF THEIR

PROJECTED NUCLEAR PROGRAMS.

2. THE SEUS HELD THREE MEETINGS:

- 21ST OCTOBER 1975: AGREEMENT OF A QUESTIONNAIRE TO BE COMPLETED BY PARTICIPATING COUNTRIES;
 - 16-18TH FEBRUARY 1976: EXAMINATION OF NATIONAL NUCLEAR POWER PROGRAMS;
 - 30TH MARCH 1976: DISCUSSION OF THE REPORT TO THE SLT.
- NATIONAL FORECASTS: A QUESTIONNAIRE WAS DESIGNED TO OBTAIN THE FOLLOWING INFORMATION FOR EACH OF THE YEARS 1980, 1985 AND 1990:

A. (I) HIGH AND LOW ESTIMATES OF INSTALLED ELECTRICAL GENERATING CAPACITY AND ELECTRICITY GENERATED, BOTH TOTAL AND NUCLEAR.

(II) THE ASSUMPTIONS, INCLUDING GNP AND GROWTH RATE OF ELECTRICITY DEMAND UPON WHICH THESE ESTIMATES WERE BASED.

B. AN ANALYSIS OF PLANNED NUCLEAR CAPACITY ACCORDING TO PRESENT STAGE, THAT IS: (I) OPERATING, (II) CAPACITY CURRENTLY UNDER CONSTRUCTION, (III) CAPACITY FOR WHICH FINANCIAL DECISIONS HAVE BEEN TAKEN, (IV) CAPACITY FULLY AUTHORISED BUT NOT YET UNDER CONSTRUCTION, (V) CAPACITY FOR WHICH PERMIT REQUESTS HAVE BEEN FILED BUT NOT YET GRANTED, (VI) OTHER PLANNED CAPACITY.

C. THE EXTENT TO WHICH FUEL CYCLE REQUIREMENTS (NATURAL URANIUM ENRICHMENT AND REPROCESSING) ARE ASSURED IN PERCENTAGE TERMS FOR THE PLANNED CAPACITY.

D. THE STATUS OF EXISTING AND PLANNED REACTORS IN RELATION TO ORIGINAL AND CURRENT FORECAST DATES, THE REASONS FOR ANY DELAYS AND THE MEASURES UNDERTAKEN TO OVERCOME CONSTRAINTS.

3. TWELVE PARTICIPATING COUNTRIES PROVIDED WRITTEN RESPONSES TO THE QUESTIONNAIRE AND TWO COUNTRIES CONTRIBUTED ORAL COMMENTS. NO NEW INFORMATION WAS PROVIDED BY AUSTRIA, LUXEMBOURG, NORWAY AND NEW ZEALAND.

4. THE SUB GROUP CONCENTRATED ITS EXAMINATION OF INDIVIDUAL COUNTRY FORECASTS ON ELECTRICITY DEMAND AND INSTALLED NUCLEAR CAPACITY FOR THE PERIOD UP TO 1985.

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THERE WAS CONSIDERABLE UNCERTAINTY CONCERNING ELECTRICITY DEMAND GROWTH RATES FOR THIS PERIOD AND SEVERAL COUNTRIES WERE UNABLE TO PROVIDE FORECASTS AT ALL FOR 1980. IT WAS RECOGNISED BY THE SUB GROUP THAT IN LIGHT OF ITS INITIAL ASSESSMENT AND GIVEN THE SHORT TIME SPAN TO 1990, AN EARLY INVESTIGATION OF THE LIKELY DEVELOPMENTS FOR THE PERIOD 1986 TO 1998 WAS MOST DESIRABLE. IT WAS ALSO NOTED THAT THE LONG TERM

ENERGY ASSESSMENT WAS BEING UPDATED FOR THIS PERIOD AND
THEREFORE THE SUB GROUP'S WORK WOULD BE COMPLEMENTARY.
BUT GIVEN THE UNCERTAINTY OF THE FORECASTS IT WAS FELT

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THAT RATHER THAN GIVING AN INCOMPLETE COMMENT IT
WOULD BE PREFERABLE, FOR THE PURPOSE OF THIS EXAMINATION
TO DEFER CONSIDERATION OF THE PERIOD 1986 TO 1990.
THE SUB GROUP ALSO AGREED THAT CONSIDERATION OF FUEL
REQUIREMENTS SHOULD TAKE PLACE AT A SUBSEQUENT MEETING
WITH A VIEW TO IDENTIFYING IN PARTICULAR THE EXTENT
TO WHICH THEY MIGHT BE A DETERMINING FACTOR IN THE
ACHIEVEMENT OF PLANS FOR INSTALLING AND OPERATING
NUCLEAR PLANTS.

5. THE COUNTRY RESPONSES TO THE QUESTIONNAIRE,
SUPPLEMENTED BY SECRETARIAT COLLATION AND PRELIMINARY
ANALYSIS FORMED THE BASIS OF THE EXAMINATION ON 16-18
FEBRUARY. EACH PROGRAM WAS CONSIDERED IN PLENARY
SESSION, ONE COUNTRY LEADING THE DISCUSSION ON THE
PROGRAM SUBMITTED BY ANOTHER MEMBER. ALL PARTICIPATING
COUNTRIES TOOK PART IN THE DISCUSSION AND AT THE CON-
CLUSION SEVERAL MEMBERS PROVIDED THE CHAIRMAN WITH
THEIR OWN ESTIMATES OF THE LIKELY INSTALLED NUCLEAR

CAPACITY OF THE OTHER MEMBER COUNTRIES IN 1985.

ANALYSIS OF FORECASTS:

6. THE SUB GROUP NOTED THAT WHILST THE HIGH ESTIMATE FOR THE YEAR 1985 REMAINED FAIRLY CLOSE TO THE UNCLASSIFIED

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ESTIMATE MADE IN AUGUST 1975 THE LOW ESTIMATE WAS CONSIDERABLY REDUCED. THIS REDUCTION RESULTS FROM TWO FACTORS: A LOWER ESTIMATE OF ELECTRICITY DEMAND AND A MORE CAUTIOUS APPROACH TO NUCLEAR POWER GROWTH. THE DISCUSSION IN THE SUB GROUP FOCUSED ON THE LOW ESTIMATES WHICH ADD UP TO AN IEA WIDE INSTALLED NUCLEAR CAPACITY OF 339.5 GWE SINCE THESE WERE THE ESTIMATES PUT FORWARD AT THE MEETING ON 16-18 FEBRUARY BY INDIVIDUAL COUNTRIES FOR THE PURPOSE OF THE ASSESSMENT. A COMPARISON OF THIS TOTAL WITH PREVIOUS ESTIMATES IS AT ANNEX I.

7. THE ESTIMATE OF ELECTRICITY DEMAND FOR 1985 MADE IN AUGUST 1975 WAS 6414.9 TWH FOR THE 13 COUNTRIES WHICH MADE A FORECAST AT THAT DATE, THE COMPARABLE LOW FORECAST MADE FOR THIS QUESTIONNAIRE WAS 6121.7 TWH, A DECREASE OF 293.2 TWH, CORRESPONDING TO A REDUCTION OF 56 GWE IN TOTAL INSTALLED CAPACITY (AT 60 LOAD FACTOR). FOR SOME IEA COUNTRIES, ALL NEW ELECTRICITY GENERATING STATIONS SCHEDULED TO BE OPERATING BY 1985 WILL BE NUCLEAR, BUT THIS IS NOT GENERAL ACROSS IEA. THE ESTIMATED AVERAGE IS THAT ABOUT 60 OF NEW CAPACITY IN IEA WILL BE NUCLEAR AND THE TABLE IN ANNEX I INDICATES THAT THE DECREASE IN ESTIMATED ELECTRICITY DEMAND WILL FALL DISPROPORTIONATELY ON NUCLEAR PLANTS. IT APPEARS THEREFORE THAT A NUMBER OF COUNTRIES STILL INTEND TO BUILD NEW CONVENTIONAL PLANTS TO MEET THE INCREASE IN ELECTRICITY DEMAND GROWTH WHILE DEFERRING NUCLEAR PLANT CONSTRUCTION. IT SHOULD BE NOTED THAT COUNTRY SUBMISSIONS ON THE TOTAL INSTALLED CAPACITY FOR 1985 DO NOT REVEAL THE REPLACEMENT OF EXISTING CONVENTIONAL POWER STATIONS. A NUMBER OF COUNTRIES INDICATED THAT THEY WERE IN THE PROCESS OF A FURTHER DOWNWARD REVISION OF THEIR ELECTRICITY DEMAND ESTIMATES. FOR THOSE COUNTRIES WHERE THERE IS A CLOSE RELATIONSHIP BETWEEN NUCLEAR GROWTH AND TOTAL ELECTRICITY DEMAND THE NUCLEAR FIGURES MAY STILL BE TOO HIGH IN THE LIGHT OF CURRENT AND PREDICTED ECONOMIC DEVELOPMENTS IN INDIVIDUAL COUNTRIES.

8. FOR SOME COUNTRIES, ESTIMATES OF INSTALLED NUCLEAR UNCLASSIFIED

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CAPACITY ARE RELATIVELY INDEPENDENT OF ELECTRICITY DEMAND GROWTH FIGURES. FOR MANY OF THESE COUNTRIES TECHNOLOGICAL, FINANCIAL, LICENSING AND SAFETY PROBLEMS ARE EXERTING A LARGER INFLUENCE THAN PREVIOUSLY EXPERIENCED OR EXPECTED. IN THE FINANCIAL FIELD, GIVEN THE PRESENT OVER-CAPACITY OF ELECTRICITY GENERATING PLANT, UNCERTAINTY OVER FUTURE DEMANDS AND POSSIBLE ADMINISTRATIVE DELAYS ON ENVIRONMENTAL OR OTHER GROUNDS, A NUMBER OF PRIVATELY OWNED UTILITIES ARE HESITANT AT PRESENT TO COMMIT THEMSELVES TO MAJOR NUCLEAR PROGRAMS FOR 1985 EVEN THOUGH THE FINANCIAL POSITION OF MOST OF THESE UTILITIES APPEARS TO HAVE IMPROVED DURING THE PAST YEAR. GOVERNMENT-OWNED UTILITIES IN A NUMBER OF COUNTRIES DO NOT EXPECT TO FINANCE THEIR PLANT CONSTRUCTION ENTIRELY FROM FUNDS ARISING OUT OF ELECTRICITY RATES AND THEREFORE HAVE THE ADDITIONAL PROBLEM OF GENERATING NEW CAPITAL THROUGH GOVERNMENT BUDGETS OR BY BORROWING.

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9. IN MANY CASES, PROGRAMS HAVE FACED LICENSING DELAYS DUE IN PART TO LACK OF TRAINED GOVERNMENT SAFETY PERSONNEL. IN ADDITION, THE RAPID INCREASE IN THE RATE OF INSTALLATION OF NUCLEAR STATIONS FORESEEN FOR THE LATTER PART OF THE PERIOD TO 1985 IS LIKELY TO GIVE RISE TO A SHORTAGE OF TRAINED COMMISSIONING STAFF. TO MEET THE PROBLEMS SOME COUNTRIES HAVE TAKEN INITIAL STEPS TO INCREASE THE TRAINED MANPOWER AVAILABLE. THIS ACTION APPEARS TO BE IN ITS FORMATIVE STAGES AND ITS EFFECTS MAY NOT BE FELT FOR SOME TIME. IN OTHER CASES TO DEAL WITH SITING PROBLEMS A FEW GOVERNMENTS HAVE ADOPTED MEASURES REQUIRING LOCAL AUTHORITIES TO ANTICIPATE FUTURE NEEDS. THE EFFECTIVENESS OF THIS ACTION HAS YET TO BE TESTED. MANY COUNTRIES EXPECT TO CONSTRUCT NUCLEAR PLANTS ON SITES ALREADY CONTAINING NUCLEAR POWER FACILITIES AND OPPOSITION FROM ENVIRONMENTAL GROUPS IS EXPECTED TO BE LESS. HOWEVER, WE STILL EXPECT DELAYS IN SECURING ADDITIONAL SITES DUE TO INCREASING PUBLIC INTERVENTIONS IN LICENSING PROCEDURES. TO MEET THIS PROBLEM A NUMBER OF GOVERNMENTS HAVE INSTITUTED

PUBLIC INFORMATION PROGRAMS AND HAVE ESTABLISHED DIALOGUES WITH LOCAL BODIES.
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10. IN AN ATTEMPT TO OVERCOME LICENSING DELAYS DUE TO TECHNOLOGICAL PROBLEMS SOME GOVERNMENTS HAVE INSTITUTED A STANDARDISATION PROGRAM AS A MEANS TO REDUCE DELAYS INDUCED BY THIS CAUSE ALTHOUGH THE PRACTICE IS NOT WIDESPREAD IN THE IEA.

11. PARTLY AS A RESULT OF THE PROBLEMS NOTED ABOVE, 40 OF THE FORECAST NUCLEAR CAPACITY FOR 1985 REMAINS IN THE TWO MOST INDETERMINATE CATEGORIES OF "CAPACITY PLANNED FOR WHICH PERMIT REQUESTS HAVE BEEN FILED BUT NOT YET GRANTED" AND "OTHER PLANNED CAPACITY". IN VIEW OF THE CONSTRUCTION AND COMMISSIONING LEAD TIMES, TO REACH THE 1985 LOW FORECASTS IT WOULD BE NECESSARY FOR CONSTRUCTION OF ALL THE PLANNED CAPACITY TO BEGIN IN THE VERY NEAR FUTURE.
FINDINGS:

12. AS STATED ABOVE THE LOW ESTIMATE FORECASTS MADE BY PARTICIPATING COUNTRIES IN RESPONSE TO THE QUESTIONNAIRE AMOUNTS TO AN INSTALLED NUCLEAR CAPACITY IN IEA FOR 1985 OF 339.5 GWE. THIS REDUCTION FROM PREVIOUS LOW ESTIMATE RESULTS FROM TWO MAIN FACTORS: ONE A LOWER AND LESS CERTAIN ESTIMATE FOR ELECTRICITY

DEMAND, THE OTHER A MORE CAUTIOUS APPROACH TO NUCLEAR POWER GROWTH BASED ON A NUMBER OF CONSTRAINTS INCLUDING TECHNOLOGICAL, FINANCIAL, SITING, AVAILABILITY OF TRAINED MANPOWER, AND PUBLIC ACCEPTANCE CONSIDERATIONS. THE RELATIVE IMPORTANCE OF THESE FACTORS VARIES FROM COUNTRY TO COUNTRY BUT ONE OR MORE ARE PRESENT IN ALL COUNTRIES" FORECASTS.

13. IN ASSESSING THE LIKLIHOOD OF IEA REACHING ITS 1985 FORECAST FOR INSTALLED NUCLEAR CAPACITY THE SUB GROUP TOOK ACCOUNT OF DATA PROVIDED BY INDIVIDUAL COUNTRIES RESPONDING TO THE QUESTIONNAIRE AND ASSESSMENTS DEVELOPED IN THE COURSE OF THE REVIEW. AS PREVIOUSLY NOTED 40 (140 GWE) OF THE TOTAL IEA WIDE LOW ESTIMATED NUCLEAR CAPACITY FOR 1985 (339.5 GWE) HAS EITHER NOT RECEIVED GOVERNMENT AUTHORISATION PERMITS OR IS STILL IN THE PLANNING STAGES. A SLIPPAGE UNCLASSIFIED

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ON ONE YEAR MIGHT BE EQUIVALENT TO A LOSS OF 40-50 GWE OF INSTALLED CAPACITY BY 1985.

14. IN LIGHT OF THE ABOVE AND ON THE BASIS OF THE EXAMINATION UNDERTAKEN THE SUB GROUP BELIEVES THAT A LEVEL OF NUCLEAR INSTALLED CAPACITY OF 275-285 GWE IS REALISTIC FOR THE PERIOD ENDING IN 1985.

15. THE FOLLOWING POINTS SHOULD BE KEPT IN MIND REGARDING THE SUB GROUP'S ESTIMATE. IT SHOULD NOT BE ASSUMED THAT THE RANGE OF FIGURES OF 275-285 IS A PROPORTIONAL SCALING DOWN OF EACH COUNTRY'S PROGRAM. THE ESTIMATE OF INSTALLED NUCLEAR CAPACITY IS STRICTLY RELATED TO THE END OF THE YEAR 1985. DUE ACCOUNT SHOULD BE TAKEN OF RELATIVELY SHORT TIME SLIPPAGE FORESEEN FOR A CERTAIN PROPORTION OF CAPACITY NOW PLANNED. SOME OF THE PLANTS SCHEDULED FOR 1985 ARE LIKELY TO COME ON STREAM IN THE PERIOD 1986-88. DELAYS OF THIS KIND MAY NOT BE SERIOUS GIVEN THE LOWER ESTIMATES OF LOAD GROWTH AND THE AMOUNT OF EXISTING

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PLANT CAPACITY AND THEREFORE MAY NOT IMPACT ON
PLANNING FOR THE FUEL CYCLE SINCE MANY COMMITMENTS FOR
NATURAL AND ENRICHED URANIUM HAVE ALREADY BEEN MADE.
HOWEVER A NUMBER OF LARGE PROGRAMS HAVE A GREAT DEAL OF
FLEXIBILITY GIVEN THE EARLY PLANNING AND NOT ALL WILL
GO FORWARD TO THE CONSTRUCTION PHASE. IT MUST BE
KEPT IN MIND THAT WE ARE IN A CHANGING SITUATION
REGARDING ELECTRICITY AND NUCLEAR POWER GROWTH RATES.
THE ECONOMIC SITUATION VARIES FROM COUNTRY TO
COUNTRY WITH SOME BEGINNING TO EXPERIENCE AN INCREASE
IN ELECTRICITY DEMAND GROWTH RATES WHILE FOR OTHERS
THE DECREASE IN THESE RATES HAS NOT YET ABATED. IN
THIS REGARD THE NUCLEAR POWER CONSTRUCTION INDUSTRIES
IN MOST COUNTRIES ARE REPORTING OVER-CAPACITY.
RECOMMENDATIONS

16. THE SUB GROUP RECOMMEND THE SLT TO TAKE NOTE
OF THE FINDINGS AS SET FORTH IN PARAS 12-15 AND ALSO TO
ASSESS ITS IMPLICATIONS AGAINST THE OVERALL ENERGY
PICTURE.

17. THE SUB GROUP SHOULD: (A) MAKE AN EARLY ANALYSIS
OF THE IMPLICATIONS OF THE FINDINGS ON THE FUEL CYCLE
REQUIREMENTS: (B) MAKE A FURTHER REVIEW ON SIMILAR
LINES OF MEMBER COUNTRIES' NUCLEAR PROGRAMS FOR 1985
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AND 1990 WITH A VIEW TO REPORTING TO THE SLT A YEAR
HENCE.

18. ANNEX I: COMPARISONS OF RECENT SUBMISSIONS FOR
ESTIMATED INSTALLED NUCLEAR CAPACITY (GWE) AND TOTAL
POWER GENERATED (TWH)

	1985	1985
	INSTALLED NUCLEAR TOTAL POWER	
	GENERATED	
	(GWE)	(TWH)
MARCH 1975		
SUBMISSION	427.5	(1)
AUGUST 1975 LOW		
CASE SUBMISSION	391.8	6414.8 (2)
DECEMBER 1975 LOW		
CASE SUBMISSION	339.5	6121.7 (3)

(1) DATE NOT COLLECTED FOR TWH

(2) FOR TWH INCLUDES ONLY 13 COUNTRIES

(3) FOR TWH INCLUDES SAME 13 COUNTRIES."

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